RELOCATION DEPARTMENT STAFFING AND JOB DESCRIPTIONS

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Staffing the Relocation/REO/Business Development Department

The size of the Relocation Department is dependent on the size of your company and the volume of relocation/reo/business development business managed by your company. In some instances there may be numerous staff members in the department or just one individual that manages all sources of business. Outlined below is information on the various types of skills necessary for the effective management of a Relocation/Reo/Business Development Department.

Below are descriptions of the skills recommended to manage the various segments of the relocation department and the referral business. Your company may also have certain parameters and metrics that you would like to include.

THOSE TO BE CONSIDERED FOR HIRE:

Individuals with previous experience in the following areas: Account management, reporting and tracking, high organizational skills, marketing, client focused, exceptional communication and influence management skills.

Previous Real Estate experience.

THE RELOCATION STAFF SHOULD BE WILLING TO COMMIT TIME AND RESOURCES IN THE FOLLOWING AREAS:

Gaining real estate and relocation knowledge through:

- National Association of Realtors
- Local Board of Realtors or Association
- Obtaining a real estate license
- Volunteering to join real estate related industry groups and committees

Subscribe to local and national real estate/relocation newsletters & periodicals:

- Mobility 1-703-842-3400
- Relocation Report www.relocationreport.com
- The Real Estate Executive Summary www.nacgonline.com
- Real Trends realtrends@realtrends.com
Attending company specific functions and meetings:

- Sales meetings
- Complete understanding of company policy
- Commission structure
- Selling skills
- Relocation specific training
- New agent training
- Visiting branch offices
- Going on broker tours
- All company functions
- Company management meetings
- Vendor meetings
- Economic Development Council meetings
- Chamber of Commerce meetings, etc.

Investigate the Employee Relocation Council –www.erc.org-which will provide the following:

- CRP designation information
- Source of relocation seminars and conferences
- Source of training

Join or attend, if appropriate at relocation industry group functions or seminars:

- ERC Conference
- Cartus Training Seminar
- RDC-Relocation Director’s Council
- Local and regional relocation/ real estate organizations
Sample Job Description for Relocation Director

PRIMARY OBJECTIVE OF POSITION:

The primary function of this position is to meet or exceed the performance requirements outlined by the various business segments/third party relocation companies in the management of Relocation/Reo/Business Development business. The scope of the position is to develop and maintain clients and services for the department and to administer policies and procedures to deliver those services to support the needs of the clients and customers. The Relocation Director must also meet or exceed the objectives set forth by the broker/owner of their company.

MAJOR AREAS OF ACCOUNTABILITY:

- Develop new services for marketing to prospective corporate clients and sales associates
- Manage incoming and outgoing referral staff, corporate home sale and business development staff, and administrative staff, etc.
- Develop and maintain client base and client communications
- Improve productivity and service to sales associates while maintaining cost control
- Maintain good relations with branch managers and sales associates
- Maintain personnel who achieve business and service objectives in an efficient, productive and cost-effective manner
- Manage training requirements as set forth by Cartus: CNAS-Cartus Network Affinity Specialist
- Maintain current data on agent background checks as required by Cartus
- Direct and review incoming and outgoing referral procedures by supervising relocation staff
- Train and direct corporate business development staff
- Generate relocation business through corporate calls with and without sales associate
- Train new and transferred sales associates on how to "sell" the relocation service to their customers and earn referral fees
- Responsible for contents of relocation package/CD, constant update and ordering of materials
- Promote relocation services to sales associates at sales meetings and through written reminders
- Generate and/or acquire promotional materials such as videos/CD’s, relocation brochures, sales contests, articles for company newsletter, agent of the year, etc.
- Create a group move presentation and keep current
- Generate and review all relocation reports
- Develop, refine, and oversee all marketing functions; act as liaison between client and Relocation Department; create an atmosphere of cooperation and mutual respect between sales associates/managers and Relocation Department.
QUALIFICATIONS:

- Strong oral and written skills
- Demonstrated marketing, leadership and management abilities
- Sound human relation skills in the performance management of staff

Education:

- Real estate license requirements
- Continuing education credits in fields of relocation

Experience:

- Two to four years general real estate
- An additional two years in the relocation area with two of those years with management responsibility

RELATIONSHIPS:

Internal:

- Principal Broker/Owner(s)
- Branch management group
- Heads of various departments, affiliated companies and divisions
- Sales associates
- Staff

External:

- Current and future clients
- Vendors
- Related professional and community organizations
Sample Job Description for Outgoing Referral Coordinator/Account Manager

PRIMARY OBJECTIVE OF POSITION:

Responsible for meeting or exceeding the outgoing referral generation and closing metrics as outlined in the yearly Cartus Strategic Alliance Contract.

MAJOR AREAS OF ACCOUNTABILITY:

⇒ Receive referrals from sales associates, confirm all information with client/customer
⇒ Create file in Broker Center
⇒ Send referral to destination/receiving broker via Broker Center
⇒ Follow-up to make certain receiving broker has confirmed receipt in Broker Center
⇒ Send referring agent the receiving agent information, encourage agent to agent contact
⇒ Make file and enter all information into company database, if applicable
⇒ Prepare paperwork to confirm referral fee and set-up monthly updates for follow up purposes
⇒ Answer calls on all problems or complaints from companies, sales associates, clients, etc., regarding their referrals
⇒ Track each agent individually on performance metrics

SECONDARY AREAS OF ACCOUNTABILITY:

⇒ Receive and answer referral update requests, send copies to referring sales associates
⇒ If a sale is reported, confirm sales information, inform sales associate and update the source of referral
⇒ Follow-up on all referrals until file is closed out or sold and has closed
⇒ Reporting and tracking of outgoing referral generation by branch by agent
⇒ Managing conversion

QUALIFICATIONS:

⇒ Excellent verbal and communication skills displaying tactfulness in all situations
⇒ Good organizational and time management skills
⇒ Account Management skills
Computer knowledge is necessity
College helpful but not mandatory
Maturity and a good sense of empathy
Real estate background helpful, however, not mandatory
Influence management skills
Conflict management skills
Complete knowledge of phone techniques
Self-starter
Dependable
Professional appearance
General office skills a necessity
College preferred with courses in real estate

Education:
Minimum high school graduate

Experience:
Minimum one year general office experience with at least six months in real estate
Proven experience dealing with pressure and stress

RELATIONSHIPS:

Internal:
Sales Associates
Principal Broker/Owner(s)
Relocation Department personnel
Branch managers
Relocation Director

External:
Other real estate company relocation personnel
Clients and customers
Sample Job Description for Incoming Referral Coordinator/Account Manager

PRIMARY OBJECTIVE OF POSITION:

Responsible for meeting or exceeding the conversion, mortgage and service metrics, etc., as they are outlined by the various incoming referral business segments.

MAJOR AREAS OF ACCOUNTABILITY

- Confirm receipt of referral in Broker Center
- Assign a trained and submitted to and passed a background check “A” Team Agent
- Contact the customer as outlined by the various business segment rules
- Contact the customer during off business hours (evenings and weekends) if they cannot be contacted during regular business hours or if there is a time difference
- Check the client registration list to see if any sales associates are already working with the customer
- Track individual agent performance by business line requirements: conversion, mortgage, service, etc.
- Create/generate reports for relocation director and management
- Follow-up with agent until files closes or has sold and transaction has closed-update all parties
- Refer rental inquiries to proper people and follow up with customer for possible future home purchase
- Track each agent individually on performance metrics

SECONDARY AREAS OF ACCOUNTABILITY

- Send relocation packet/CD area information to the customer
- Update referring source via Broker Center (regularly)
- Respond to referring source when contacted by referring source
- Present at new sales agent training and branch office meetings when necessary
QUALIFICATIONS:

- Effective communication skills
- Good organizational and time management skills
- Conflict resolution skills
- Real estate background helpful
- Work independently
- Organized, detail oriented, multi-tasking
- Account management skills
- Mature and good sense of empathy
- Self-starter
- Dependable
- Patience and tact as referrals come in at the end of the day
- Computer skills
- Able to work under pressure and deal with stress
- Professional appearance

Education:

- Minimum high school graduate or equivalent
- Real estate courses

Experience:

- Minimum one year practical real estate experience

RELATIONSHIPS:

Internal:

- Sales Associates
- Principal Broker/Owners(s)
- Relocation Department personnel
- Branch management
- Relocation Director

External:

- Other broker network relocation department personnel
- Clients and customers
Sample Job Description for Corporate Inventory Resale Specialist/Corporate Homes Account Manager

PRIMARY OBJECTIVE OF POSITION:

To coordinate the management, marketing, sale and closing of a corporate or third party Home Marketing and/or Inventory listing. To meet or exceed the BMA time guidelines, BMA Variance, TDE and DOM performance metrics associated with this line of business.

MAJOR AREAS OF ACCOUNTABILITY:

- Assign a trained and completed and passed a background check, “A” team agent
- Confirm receipt of referral in Broker Center
- Review and sign off on BMA report
- Create and review a marketing strategy for each individual property
- Create an individual buyer profile for each property
- Review 14 day update marketing reports
- Make certain that all BMA’s, marketing reports, templates are completed within the outlined timelines
- Make certain that all necessary paperwork is displayed in the property including sample contract of sale, Cartus Home Loans/PHH Mortgage information, copies of all inspections, house flyer, sign in sheet, etc.
- Inspect property and make recommendations to the client regarding sale price, property condition, etc.
- Monitor vendor work to ensure quality
- Present purchase offers--review contract
- Communicate any status changes on property to sales associate (marketing strategy, property conditions, etc.)
- Coordinate closing procedures and resolve any closing problems with the Cartus RCO-Regional Closing Office
- Review content of 14 day marketing report prepared by sales associate on listed property. Content to include marketing strategy, pricing, condition of property, comparable sales/listings, absorption rate, etc.
- Act as a liaison between Cartus, the seller and the sales associate
- Monitor all property inventory, noting all pertinent information about each property
- Coordinate commission payouts
- Track each agent individually on performance metrics
QUALIFICATIONS:

- Real Estate license--minimum of one year practical experience
- Third-party background or knowledge
- Account management skills
- Conflict resolution skills
- Effective communication with Cartus, the seller and the sales associate
- Ability to direct others and work in a team environment
- Good organizational skills
- Detail oriented
- Self-starter--able to work independently
- Dependable
- Ability to work under pressure and deal with stress
- Professional appearance

Education:

- Minimum high school graduate or equivalent
- Real estate courses
- Real estate license required

Experience:

- Minimum one year practical real estate experience

RELATIONSHIPS:

Internal:

- Sales associates
- Principal Broker/Owner(s)
- Relocation Department
- Relocation Director
- Branch Managers

External:

- Corporate Client
- Cartus personnel
- Sellers
- RCO-Regional Closing Office
- Cartus Home Loans/PHH Mortgage
Sample Job Description for
Assistant to Corporate Inventory Resale Specialist/Corporate Homes Account Manager

PRIMARY OBJECTIVE OF POSITION:

The primary purpose of this position is responsibility for providing assistance to the Corporate Inventory Resale Specialist/Account Manager in the management and marketing or Home Marketing and primarily for Inventory properties.

MAJOR AREAS OF ACCOUNTABILITY:

Maintenance of Properties:

- Assist in overall day-to-day management and closing of Home Marketing and primarily Inventory property files
- Set up listing files, change utilities into company's name, order yard care/snow removal, cleaning, debris removal and winterization if appropriate
- Place property in MLS listing it as "Corporate-owned"
- Send out listing packet to sales associate and verify vacancy date for utility transfer and initial inspection
- Order updated BMA from agent, if requested
- Manage and track the timeliness of the vacant property report, templates, marketing updates, repair and improvement bids
- Develop and maintain a working relationship with all vendors involved in general maintenance, various bids, and those who winterize/de-winterize properties
- Order bids on vendor work after initial inspection. Follow up on receipt of vendor bids making sure all bids are for same work and bids have been added properly. Be responsible for sending these to third party companies and follow up on their approval
- Completed repairs and improvements must be inspected and photo's must be taken of completed work and sent to Cartus
- Review property flyer
- Make certain agent has posted property on multiple web sites with a minimum of 6 photo's on each site
- Inform all vendors of payment schedules and submit all bills in a timely manner. Make sure service dates are on all bills
- Input all new listings, sales information, BPO's/BMA's, MLS changes into computer on a regular basis
- Review final bills to be sent to RCO 3 days prior to closing
Sales:

- Send processed contracts to third party for signature or RCO and take responsibility for timely follow-up on the receipt and distribution of signed contracts
- Coordinate closing aspects with the RCO
- Order any vendor work required through negotiations on purchase agreement, the buyer’s inspection or lender required repairs
- Call sales associate prior to closing to coordinate final walk-through by buyers and verify loan approvals and closing date/time
- Record scheduled closings on the calendar
- Assist the closing representatives in whatever capacity necessary to facilitate a smooth closing
- Track each agent individually on performance metrics

QUALIFICATIONS:

- Real Estate experience helpful
- Effective communication skills
- Computer skills
- Reporting and tracking skills
- Conflict management skills
- Detail oriented, self-starter, dependable
- Ability to work under pressure and deal with stress
- Professional appearance

Education:

- High school graduate or equivalent, real estate license required

Experience:

- One year general office experience
- Six months real estate experience
- Proven experience in dealing with various clientele in stressful situations

RELATIONSHIPS:

Internal:

- Sales associate and branch managers, other relocation department personnel

External:

- Cartus personnel
- Vendors
- Property sellers
Sample Job Description for
Corporate Marketing Representative/Business Development
Account Manager

PRIMARY OBJECTIVE OF POSITION:

To develop on-going corporate accounts and exclusive relocation agreements with corporations throughout the market area through:

- A professional sales and marketing effort in the designated area
- Develop relationships with area groups whose job it is to attract new businesses to the area

Support the Relocation Director in developing and maintaining strong working relationships with corporate clients and their transferees.

Must be able to interact, both in writing and verbally, with staff, executives, recruiters, human resources personnel, and development representatives in a professional and service-oriented manner.

MAJOR AREAS OF ACCOUNTABILITY:

- Initiate phone calls and set up an appointment with Human Resource personnel. Initial presentation introducing [Broker] and services. Provide a consistent and focused effort to generate new business opportunities from the local marketplace by prospecting for new business using business databases, print media, Internet, business affiliations and sphere of influence.

- Based on the results of the phone call, arrange appropriate follow-up and face to face appointments. If the company is willing to allow [Broker] the opportunity to work with their clients, prepare corporate introductory packets for contact use.

- If it is discovered that there is a national or international assistance needed, or assistance in areas that Broker cannot provide, set up an appointment with the appropriate Cartus Business Development person to further secure the corporate relationship through Cartus.

- Monitor the activity of each active corporate account to determine the quality of the relationship and the cost effectiveness to [Broker]. Set up an appropriate evaluation meeting with the corporate contact on a pre-determined schedule.

- Periodically, set up the follow-up meetings to introduce the staff and other areas of [Broker] to the companies.
-coordinate activities/functions geared towards the corporate clients. Provide special services for projects such as group moves, presentations, and develop opportunities to intensify [Broker] corporate identity.


- Participate in any activities that would help to develop relationships with individuals in either Human Resources or other positions involving relocation issues to direct business to [Broker].

**QUALIFICATIONS:**
Perseverance
Strong follow-up and investigative skills
Strong oral and written skills
Demonstrated marketing and leadership abilities
Be a self-starter and have a dynamic out-going personality

**Education:**
College degree or equivalent work experience in marketing and sales
Real estate license required
Continuing education credits in fields of relocation and marketing

**Experience:**
Two to four years
General real estate sales experience preferred

**RELATIONSHIPS:**

**Internal:**
- Principal Brokers/Owners(s)
- Relocation Director
- Administrative group
- Sales management group
- Heads of various affiliated companies and divisions
- Sales Associates

**External:**
- Current and future corporate clients
- Related professional and community organizations